

Equipment Maintenance - Maintenance Plan Setup

Last Modified on 04/09/2026 12:42 pm PDT

Pathway: Setup > Operations > Equipment Maintenance > Maintenance Plan

The **Equipment Maintenance Plan Setup** screen combines the equipment maintenance configurations added in Work Code and Parts and Supplies to establish a comprehensive maintenance plan for trucks and equipment.

EQUIPMENT MAINTENANCE PLAN SETUP
SETUP > OPERATIONS > EQUIPMENT MAINTENANCE > MAINTENANCE PLAN

ID	NAME	CALENDAR DAYS FREQUENCY	ENGINE HOURS FREQUENCY	ODOMETER FREQUENCY	PTO HOURS FREQUENCY	ACTIVE
1000	Scheduled PM Type A			10000		Yes

Line Of Business
Labor
Parts and Supplies
Attachments

ATTACHMENT ID	NAME	UPLOADED DATE	DELETE

Field Descriptions

Field	Description
Schedule (Upper Grid)	
ID	The ID assigned to the plan once it has been saved.
Name	Displays the name of the equipment maintenance plan.
Calendar Days Frequency	Displays the frequency at which maintenance should occur determined by calendar days.
Engine Hours Frequency	Displays the frequency at which maintenance should occur based on the number of hours recorded on the engine.
Odometer Frequency	Displays the frequency at which maintenance should occur based on the distance driven.
PTO Hours Frequency	Displays the frequency at which maintenance should occur based on the PTO measurement.

Active	Indicates if the maintenance plan is available for use.
Line of Business	
Line of Business	Displays each line of business the equipment maintenance can be available to.
Labor	
Work Code	Displays the available work codes previously created in <i>Setup > Operations > Maintenance Equipment > Work Code</i> .
Estimated Hours	Displays the estimated labor hours it will take to complete maintenance work.
Note	Displays a note if one was entered for the work code.
Parts and Supplies	
Work Code	Displays the available equipment parts previously created in <i>Setup > Operations > Maintenance Equipment > Parts and Supplies</i> .
Quantity	Displays the quantity of parts needed for maintenance.
Note	Displays the note entered in Parts and Supplies setup for the work code.
Attachments	
Attachment ID	Displays the ID assigned to the attachment upon upload.
Name	Displays the name for the attachment.
Uploaded Date	Displays the date the attachment was uploaded.
Delete	Option to delete the attachment from the list of Attachments.

Add Equipment Maintenance Plan

The screenshot shows the 'EQUIPMENT MAINTENANCE PLAN SETUP' interface. A modal window titled 'ADD EQUIPMENT MAINTENANCE PLAN' is open, allowing users to create a new maintenance plan. The modal includes the following fields and options:

- NAME:** A text input field.
- DESCRIPTION:** A rich text editor with a toolbar.
- ACTIVE:** A dropdown menu set to 'Yes'.
- TYPE:** A dropdown menu set to 'Vehicle'.
- Frequency Schedule:** A section with four rows of input fields:
 - CALENDAR - EVERY:** Input field, 'DAYS +/-', Input field.
 - ENGINE - EVERY:** Input field, 'HOURS +/-', Input field.
 - ODOMETER - EVERY:** Input field, 'kilometre' dropdown, '+/-', Input field.
 - PTO - EVERY:** Input field, 'HOURS +/-', Input field.
- SAVE:** A green button at the bottom of the modal.

In the background, a table with columns 'ID', 'FREQUENCY', and 'ENGINE HOURS FREQUENCY' is visible. The table contains two rows: '1000' and '1001'. A red arrow points to a '+' icon in the table header, indicating the 'Add' function.

1. Select the **Add** icon from the Equipment Maintenance Plan Setup screen to open the **Add Equipment Maintenance Plan** editor.
2. Enter a **Description** to provide additional notes or requirements for the plan.
3. Select 'Yes' from the **Active** drop down.
4. Select if the maintenance plan applies to a vehicle or equipment from the **Type** drop down.
5. From the **Frequency Schedule** section, enter what applies to the vehicle/equipment.
6. Click **Save** when finished.

Create a Maintenance Plan: Tabs

The screenshot shows the 'EQUIPMENT MAINTENANCE PLAN SETUP' screen. At the top, there is a breadcrumb trail: 'SETUP > OPERATIONS > EQUIPMENT MAINTENANCE > MAINTENANCE PLAN'. Below this is a table with the following data:

ID	NAME	CALENDAR DAYS FREQUENCY	ENGINE HOURS FREQUENCY	ODOMETER FREQUENCY	PTO HOURS FREQUENCY	ACTIVE
1000	Scheduled PM Type A			10000		Yes
1001	Oil Change			6000		Yes

Below the table are four tabs: 'Line Of Business', 'Labor', 'Parts and Supplies', and 'Attachments'. The 'Line Of Business' tab is highlighted with a red box. Below the tabs is a section titled 'LINE OF BUSINESS' with a list of categories and toggle buttons:

- Document Destruction:
- Commercial:
- Hazardous Material:
- Landfill:
- Medical Waste:
- Miscellaneous:
- Residential:
- Roll Off:
- Scale:
- Used Oil Collection:

Add: Line of Business

Select the Line of Business tab to assign each line of business the maintenance plan should be available to using the toggle buttons.

This screenshot is identical to the one above, but the 'Line Of Business' tab is now selected and highlighted in blue. The toggle buttons for the 'LINE OF BUSINESS' section are as follows:

- Document Destruction:
- Commercial:
- Hazardous Material:
- Landfill:
- Medical Waste:
- Miscellaneous:
- Residential:
- Roll Off:
- Scale:
- Used Oil Collection:

Add: Labor

Select the Labor tab and add all work codes that the maintenance plan should include using the toggle buttons.

EQUIPMENT MAINTENANCE PLAN SETUP SETUP > OPERATIONS > EQUIPMENT MAINTENANCE > MAINTENANCE PLAN

+ ↻

ID	NAME	CALENDAR DAYS FREQUENCY	ENGINE HOURS FREQUENCY	ODOMETER FREQUENCY	PTO HOURS FREQUENCY	ACTIVE
1000	Scheduled PM Type A			10000		Yes
1001	Oil Change			6000		Yes

Line Of Business | **Labor** | Parts and Supplies | Attachments

WORK CODE	ESTIMATED HOURS	NOTE	
Brake Replacement - Front Brakes			<input type="checkbox"/>
Oil Change			<input checked="" type="checkbox"/>
Fuel Pump			<input type="checkbox"/>
Air Brake Inspection			<input type="checkbox"/>
Filters			<input type="checkbox"/>

Add: Parts and Supplies

Select the Parts and Supplies tab and add all work codes for the parts and supplies needed to perform the required maintenance for the plan.

EQUIPMENT MAINTENANCE PLAN SETUP SETUP > OPERATIONS > EQUIPMENT MAINTENANCE > MAINTENANCE PLAN

+ ↻

ID	NAME	CALENDAR DAYS FREQUENCY	ENGINE HOURS FREQUENCY	ODOMETER FREQUENCY	PTO HOURS FREQUENCY	ACTIVE
1000	Scheduled PM Type A			10000		Yes
1001	Oil Change			6000		Yes

Line Of Business | Labor | **Parts and Supplies** | Attachments

WORK CODE	QUANTITY	NOTE	
Battery and Charging System			
Brakes and Steering			
Tires			
Synthetic Oil			
Oil Filter			
Cabin Filter			
Engine Filter			
Wheel Well			

Add: Attachments

Select the Attachments tab to upload any attachments such as maintenance plan sign-offs or requirements that can be reviewed or printed.

EQUIPMENT MAINTENANCE PLAN SETUP				SETUP > OPERATIONS > EQUIPMENT MAINTENANCE > MAINTENANCE PLAN		
+						
ID	NAME	CALENDAR DAYS FREQUENCY	ENGINE HOURS FREQUENCY	ODOMETER FREQUENCY	PTO HOURS FREQUENCY	ACTIVE
1000	Scheduled PM Type A			10000		Yes
1001	Oil Change			6000		Yes
<div style="display: flex; justify-content: space-between; border: 1px solid #ccc; padding: 2px;"> Line Of Business Labor Parts and Supplies Attachments </div>						
+						
ATTACHMENT ID	NAME	UPLOADED DATE			DELETE	
1000	TestUploadDoc.docx	06/26/23 10:48 am			-	

Related Articles

[Equipment Maintenance](#)